

Account Plan – ABC Bank Limited

 OUR ACCOUNT TEAM			
Account Manager	David Jones	Solution Specialist	Harvey McPhee
Sales Manager	John Smith	Technical Account Manager	Chris Evans
Partner Account Manager(s)	Don Jolly, IBM	Ivor Tunn, Oracle	
 ACCOUNT PLAN DETAILS			
Customer Details			
Parent Company	ABC Banking Corp. (USA)	Our revenue last year	£200k
Turnover	£650m	Forecast for this year	£500k
Profit	£50m	Customer since	2005
Employees	4,000 (UK)	Location(s)	London, Manchester
Year-end	March	Contract in place?	Yes
Perception of Us	Positive	Contract Owner	John Smith
Business Overview			
Customer's Core Business	<p>ABC Banking Corporation has headquarters in New York and hundreds of office locations globally. ABC sites range from thousands of employees in several large locations, to hundreds of employees in several regional. Additionally, it manages thousands of ATM machines worldwide. Growth by acquisition has led to the bank maintaining 6 data centres around the world, including London.</p> <p>Attention to customer service is paying off. The bank is growing at 15% per year via a combination of organic growth and ongoing acquisitions. Critical to ABC's mission is the availability and performance of its worldwide IP network that supports all internal systems as well as the key customer-facing online banking and ATM systems. Significant regulatory activity affecting the banking industry worldwide, including both Sarbanes Oxley and Payment Card Industry Data Security Standards (PCI DSS) put additional burdens on the bank to ensure reliable and secure network operations.</p> <p>A third area of critical importance to the bank is cost control. Although the bank continues to invest in new technologies, such as replacing its aging Frame Relay service with new MPLS connectivity, and to make strategic acquisitions to grow its presence worldwide, the IT budget faces constraints today that are forcing IT operations to look for reductions in capital and operating expenses that just a few years ago faced little or no scrutiny.</p>		
Mission Statement	<p>ABC strives to be globally recognised as a financial services provider delivering consistently superior services by anticipating and surpassing the needs of customers, investors, employees, partners and communities where it does business. ABC is committed to using technology to make banking more readily available to its customers, and managing costs to maximise shareholder value.</p>		
Competitive Landscape	<p>Banking has always been a competitive industry. But recent economic conditions that affect the bank's ability to generate profits from its loan portfolio, a trend toward pricing flexibility for loans to both consumers and businesses in order to maintain customer loyalty, new competition from non-financial institutions that are</p>		

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	entering the banking business and pervasive regulation puts pressure on ABC's management team to operate more efficiently and profitably. To achieve its goals, ABC is committed to superior customer service to prevent customer churn, highly reliable network operations to ensure a high degree of customer satisfaction and stringent financial management to maintain profitability and shareholder confidence.
Budgetary Sign-off Process	Final decisions for all major purchases that impact ABC's business are the CEO and CFO. The CIO, IT Operations Manager and IT Infrastructure Manager all influence decisions that are deemed critical to IT and networking services that ABC's businesses rely on. Also involved in IT decisions are line-of-business managers, such as online banking and ATM operations.

Business & IT Initiatives

Business Initiatives	IT Initiatives
1. Continue consistent growth and expansion.	Integrate infrastructure management solutions to reduce complexity of disparate tools for network management.
	Centralised operations where appropriate; distribute regional management as necessary where appropriate.
2. Ensure service availability of critical banking operations.	Provide visibility into services impacted by performance and fault issues through introduction of CMDB.
	Introduce ITIL version 3 processes and supporting tools.
3. Achieve industry-leading customer and employee satisfaction.	Improve end-to-end response time for customer-facing applications.
	Provide IT management tools to IT operations to reduce rote tasks and increase time for new, career (and satisfaction)-enhancing projects.
4. Contain increases in Capital Expenditures and Operating Expenses to 5%.	Automate routine IT tasks to improve OPEX.
	Re-negotiate supply agreements for hardware, software, consultancy services and maintenance.

Key Contacts

Role	Name	Title	Comments
Sponsor	Ian McEwan	Infrastructure Manager	Our key supporter
Decision Maker	Gordon Black	Chief Executive	Little contact
Decision Maker	Mike Nutt	Chief Information Officer	Hard but fair
Approver	Pat Cash	Chief Financial Officer	Needs strong business case
Influencer	Peter Rush	Network Manager	On our side
Procurement	Isaac Hunt	Purchasing Manager	Lives up to his name

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Competitive Solutions Installed			
Solution	Customer Perception		
XP Service Desk	Concerned about upgrade strategy		
Network Nodule Manager	Looking to replace		
Opportunities			
	1	2	3
Requirement	Replace Service Desk and implement CMDB	Improve end-to-end response time	
Business Driver	ITIL Version 3	Customer service	
Timescales	September	December	
Potential Value	£200k	£100k	
Sponsor	Ian McEwan	Peter Rush	
Decision Maker	Mike Nutt	Pat Cash	
Threats	Incumbent supplier	Out to tender	
Action Plan			
Action	Owner	Target Date	Status
Complete whitespace assessment	David Jones	May	In progress – almost complete
Influence Service Desk/CMDB requirements	David Jones	June	Meeting arranged
Take Mike Nutt/Pat Cash to lunch	John Smith	July	PA arranging
Discover key metrics and drivers for customer service project	David Jones	July	Meeting requested
Engage partners for customer service project	Harvey McPhee	August	Partner assessment under way
Set up Proof-of-Concept environment	Chris Evans	August	Not started